FOLDRite™ TEMPLATE MASTER

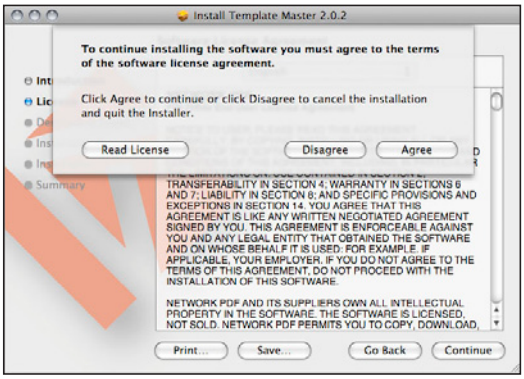
for Adobe® InDesign®

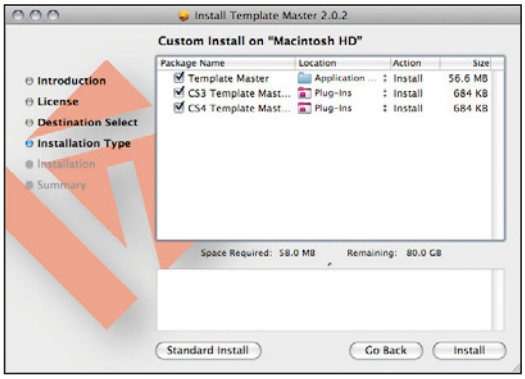
Version 2.0 User Manual

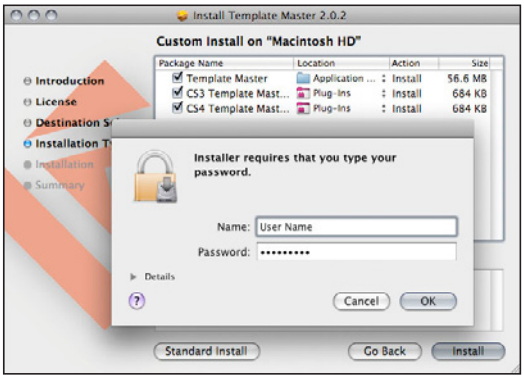
PLEASE NOTE:

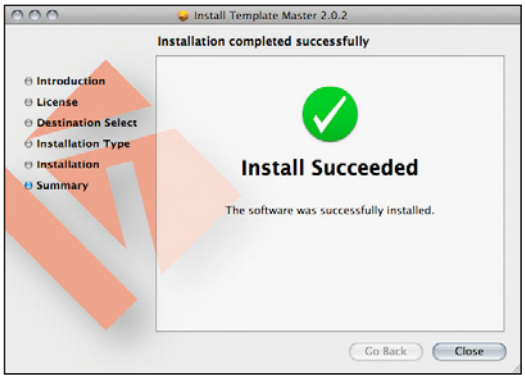
The only difference between FOLDRite Template Master version 1.0 and version 2.0 is compatibility with Adobe InDesign CS4. If you are not running CS4, you do not need to upgrade, as there are no new features.

Installing Template Master (Macintosh):


Install Template Master 2.0.2
To continue installing the software you must agree to the terms of the software license agreement.
Click Agree to continue or click Disagree to cancel the installation and quit the Installer.
Read License
Disagree
Agree
Print...
Save...
Go Back
Continue

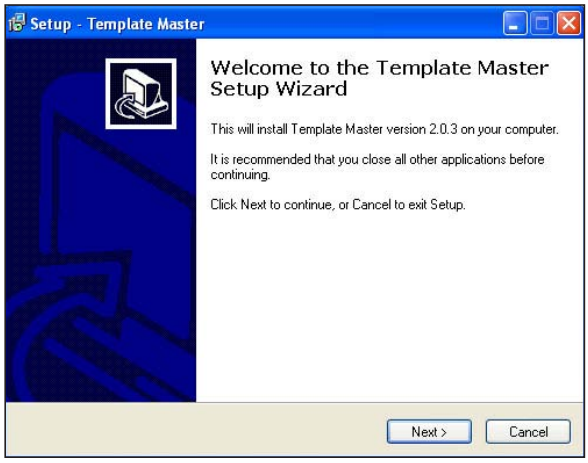






1. If you have InDesign running on your computer, quit the software.
2. Download the file: "Template Master Macintosh" using the link provided.
3. Once downloaded, open the file. If your browser doesn't open it automatically, you can open it by double-clicking its icon in Finder.
4. Once the window appears, follow the quick and easy 6-step instructions for installation.

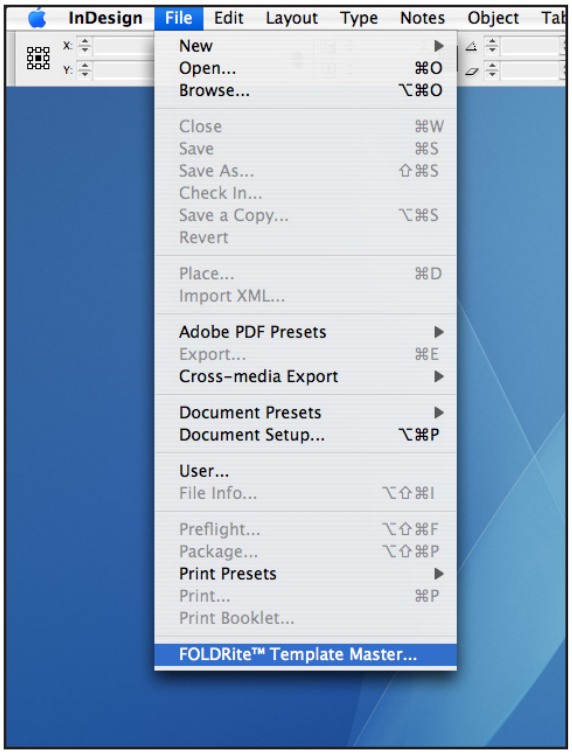
Installing Template Master (Windows):


Setup - Template Master
Welcome to the Template Master Setup Wizard
This will install Template Master version 2.0.3 on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

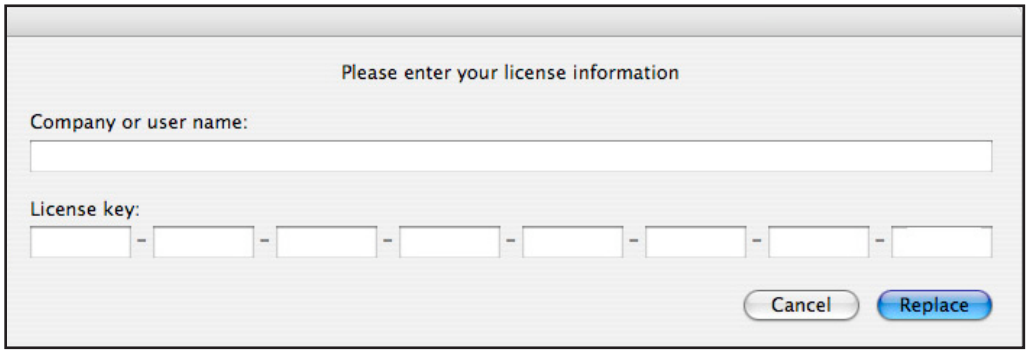
1. If you have InDesign running on your computer, quit the software.
2. Using the link provided, download file: "Template Master Windows." Unzip the file.
3. Open the Template Master Windows directory and double-click on the file, "setup.exe"
4. Follow the steps of the Setup Wizard.

Launching Template Master:

1. Once the plug-in has been installed, launch InDesign.
2. Choose File > FOLDRite™ Template Master . . .
3. A window will appear notifying you that you are in demo mode. You may choose to try demo mode first, or enter your license key. You will have the opportunity to register every time you launch the software until you enter the license key. You may also choose “Enter License Key” from the Template Master menu in the top navigation bar.
4. If you have chosen to purchase Template Master, you will receive a license key in a confirmation email from our online store. Enter your company or name, then copy the key and insert the cursor into the first license key field, then paste. This will fully activate the software.

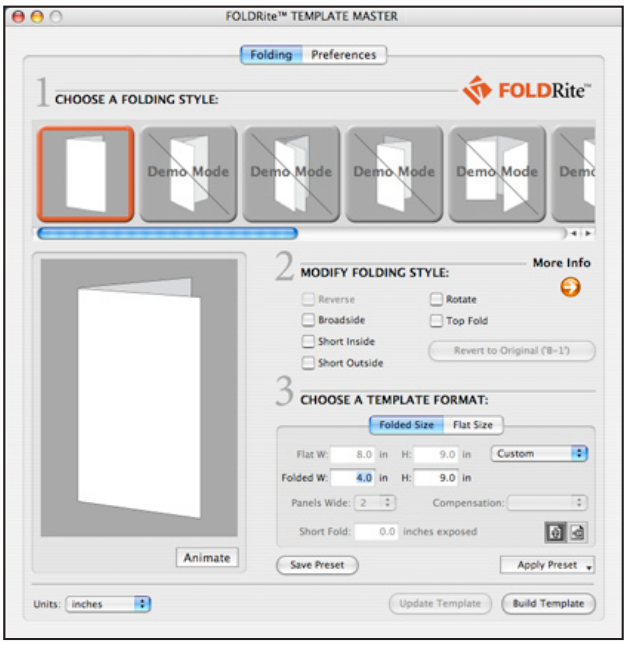


You are currently running in demo mode. Would you like to enter a license key?
Press 'Enter...' to enter a new license key now.
You can also always enter a new license key from the 'File' menu.
Later
Enter...



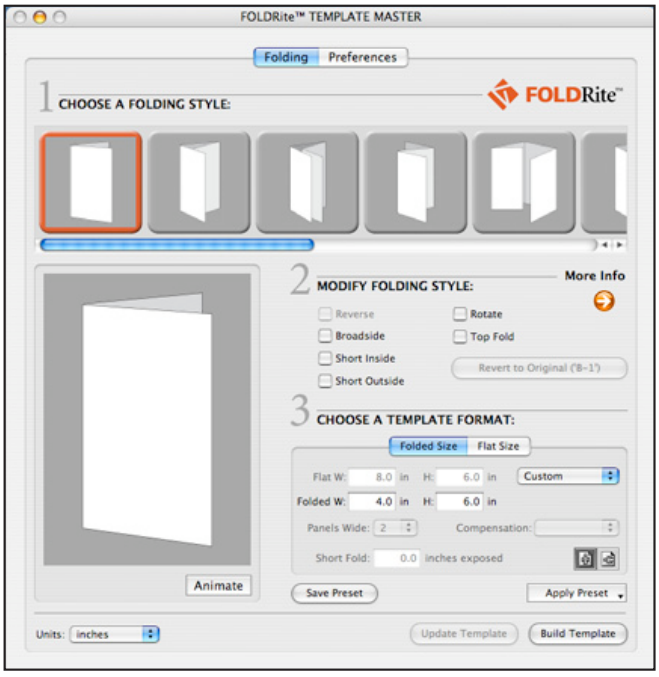
Template Master Demo mode vs. Full Access mode:

Demo mode is restricted to the first folding style in the top scrolling menu.

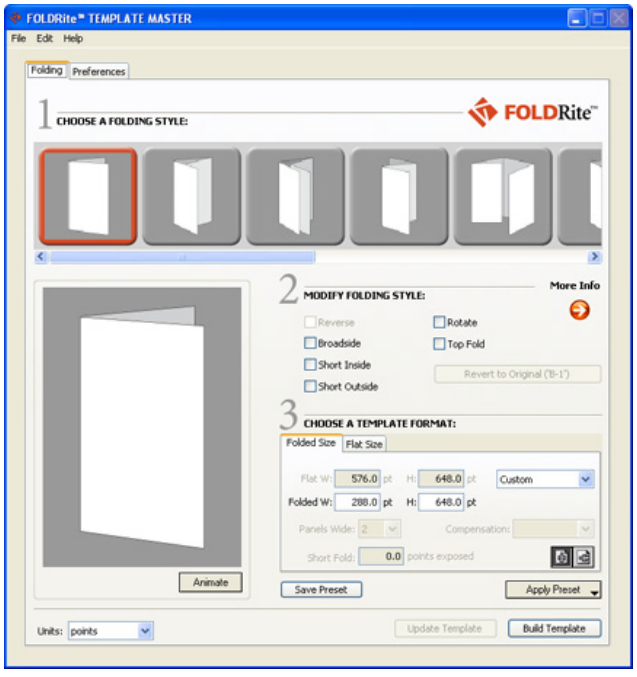


Demo mode allows template building privileges for one folding style only—the first fold in the top scroll menu. All other folding styles may be viewed and explored, but the ability to build templates has been disabled. Please note that Demo mode has no time limit.

Full access mode is unrestricted.



Sample Mac interface



Sample Windows interface

Template Master Anatomy:

The FOLDRite™ Template Master interface is designed to be highly intuitive. A simple, three step process builds templates quickly and easily.

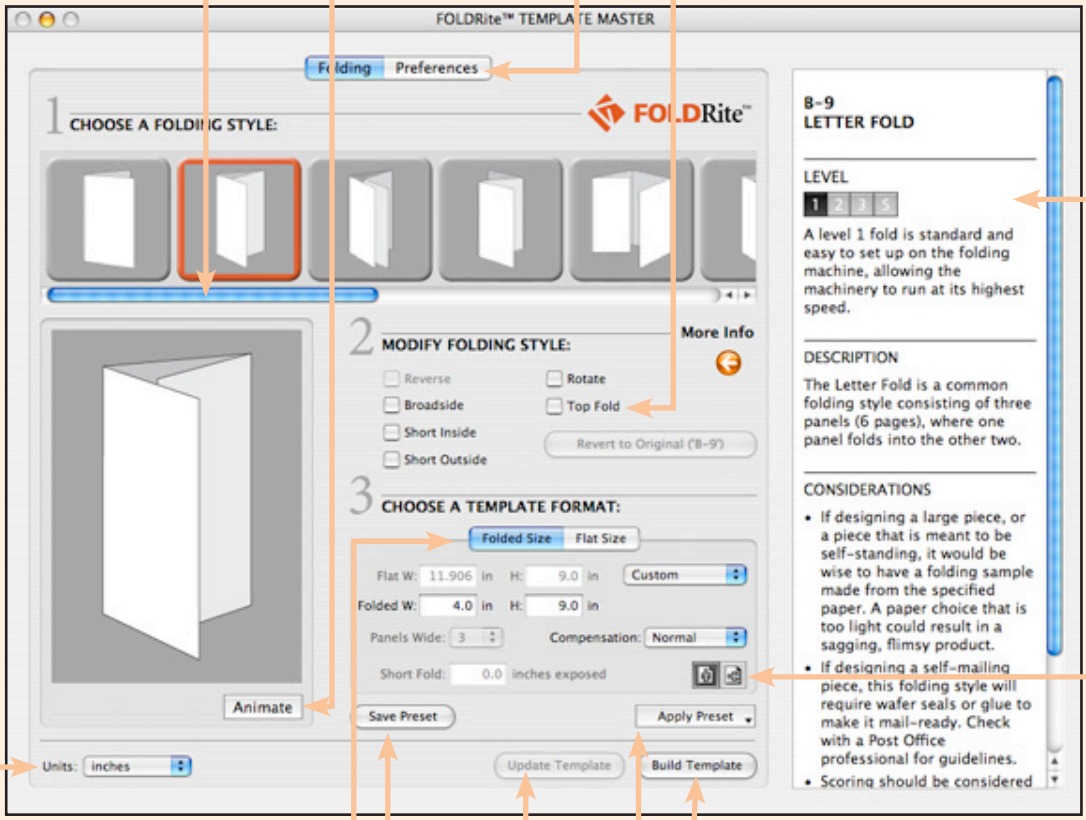
Choose a folding style from the sliding menu of illustrations.

Change guide color, font, and other user preferences by clicking the "Preferences" button.

You may choose to leave the style as-is, or you can modify it, by clicking the available check-boxes in step 2. You can revert back to your original fold by clicking the revert button, or uncheck the checkbox and check a different one. You can also go back to step 1 at any time and choose something else.

Change units of measurement with the Units drop menu.

View a folding animation at any time by clicking the "Animate " button.


FOLDRite™ TEMPLATE MASTER
Folding
Preferences
1 CHOOSE A FOLDING STYLE:
FOLDRite™
8-9
LETTER FOLD
LEVEL
1 2 3 S
A level 1 fold is standard and easy to set up on the folding machine, allowing the machinery to run at its highest speed.
DESCRIPTION
The Letter Fold is a common folding style consisting of three panels (6 pages), where one panel folds into the other two.
CONSIDERATIONS
• If designing a large piece, or a piece that is meant to be self-standing, it would be wise to have a folding sample made from the specified paper. A paper choice that is too light could result in a sagging, flimsy product.
• If designing a self-mailing piece, this folding style will require wafer seals or glue to make it mail-ready. Check with a Post Office professional for guidelines.
• Scoring should be considered
2 MODIFY FOLDING STYLE:
More Info
Reverse
Broadside
Short Inside
Short Outside
Rotate
Top Fold
Revert to Original ("8-9")
3 CHOOSE A TEMPLATE FORMAT:
Folded Size
Flat Size
Flat W: 11.906 in H: 9.0 in Custom
Folded W: 4.0 in H: 9.0 in
Panels Wide: 3
Compensation: Normal
Short Fold: 0.0 inches exposed
Animate
Save Preset
Apply Preset
Units: inches
Update Template
Build Template

Once the folding style has been chosen and modified, Step 3 allows the user to enter custom specifications by folded size or flat sheet size. If you choose the "folded size" tab, you may enter your own specifications, or choose from a wide selection of envelope enclosure sizes by choosing from the "Custom" drop menu.

If you choose the "flat size" tab, you may enter your own specifications, or choose from a wide selection of standard cut sheet sizes by choosing from the "Custom" drop menu.

Save your specifications by choosing "Save Preset." You'll be asked to name it, and then the saved preset will appear in the "Apply Preset" drop menu. Simply choose your preset to populate the saved information at any time.

"Update Template" is an exciting feature allows a user to update and modify an existing FOLDRite™ Template, or allows them to convert an existing InDesign file into a FOLDRite™ template—all without moving the artwork currently on the page!

The button is grayed-out until an InDesign document is open. If you have multiple InDesign documents open, the Update feature works only on the front-most document. The document can be a FOLDRite™ Template generated by the plug-in, or an existing InDesign file that was not created using Template Master. The Update button will only be enabled if the file is capable of being turned into a template. Any InDesign document that is 2 or fewer pages in size can be updated. Simply open an InDesign file and launch Template Master if it is not already open by choosing File > FOLDRite™ Template Master. Choose the new folding style, size, etc. and click "Update Template".

View more information about your folding style by viewing the "More info" sidebar. Click the "More info" button to hide and reveal.

Toggle measurements with the landscape/portrait buttons

When you're satisfied with your settings, click "Build Template"

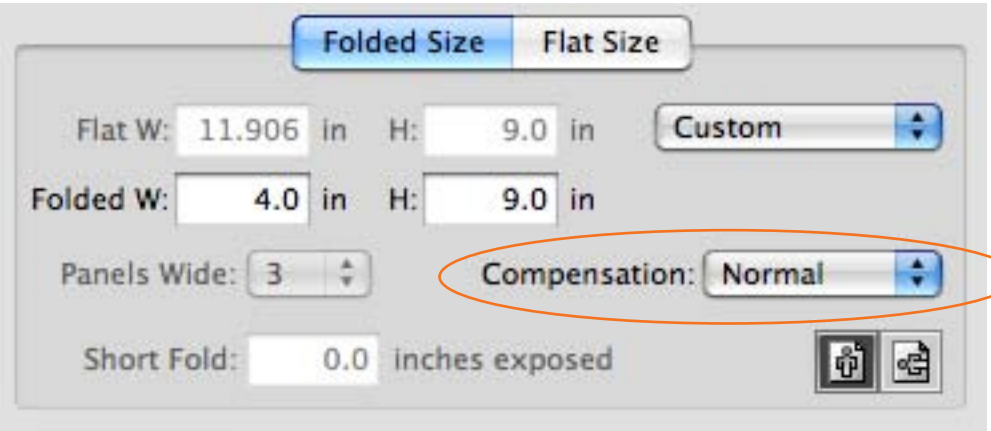
The importance of folding compensation

What looks like a folding mistake by the bindery is often designer error. It's important to understand that paper is dimensional, and if a panel of a brochure is to fold into another, it must be slightly smaller to accommodate for the thickness of the sheet and for the subtle process variation in machine folding. If this critical adjustment is not made, the result will be what's called "telescoping," or the inability for the folded piece to lay flat. The brochure will have a roundish profile because the panels are too long and push against each other for lack of anywhere else to go. The bindery worker will adjust the placement of the folds so the piece will lay flat, but margins and color breaks will shift noticeably—ultimately causing client disappointment.

This common problem is totally preventable if a proper folding template is used. FOLDRite Template Master was designed to address this industry-wide problem by providing ready-to-use dynamic folding templates. As one might imagine, if the fold becomes more complicated, the compensation placement and allowances get more complicated as well, but Template Master does all the work in the background using industry-approved folding compansation algorithms. Simply build your template and start designing—it's that simple.

Which compensation amount should I use?

In step 3 of the user interface, you may be given the option of choosing a folding compensation amount. The choices are Normal, Increased and Heavy. **In most cases, the "Normal" setting will be what is most appropriate,** since it is based on an industry-approved mathematical measurement. However, we offer the option to incrementally increase the amount of compensation to accommodate for a cover weight sheet, or for a preference to have a very generously compensated product.



Making a Template

Template Master was designed to be easy to use and visual. See the diagram on the previous page for a list of all of the features.

Making templates with Template Master is a three-step process:

- **Step 1: Choose a folding style.** View illustrations of the folding choices by grabbing the slider bar and moving it right and left. Click an image to select the folding style and the small image will be magnified in the larger image window. The user can click the "Animate" button to see how it folds, or click the "More info" button to learn more about the folding style.
- **Step 2: Modify folding style.** Most of the folding styles in the top slider menu can be modified, which adds up to 85 different folding styles. Users can view possible modifications by clicking on any of the "active" check boxes in step 2. Click again to deselect, or click the "Revert" button to go back to the original. Grayed-out check boxes are unavailable. The user can go back to step 1 at any time in the process.
- **Step 3: Choose a template format.** Step 3 allows the user to enter custom specifications by folded size or flat sheet size. Click the tab to switch from Folded size to flat sheet size. If "folded size" is chosen, the user may enter their own custom width and height measurement, or choose from a wide selection of envelope enclosure sizes by choosing from the "Custom" drop menu. If the "flat size" tab is chosen, the user may enter their own flat sheet size, or choose from a wide selection of standard cut sheet sizes by choosing from the "Custom" drop menu.

  Other options in this step include panel count (for some folding styles), orientation, saving presets, increasing compensation amounts, and setting short fold measurements (only for the short fold modification). When all specifications have been made, click the "Build Template" button and watch Template Master instantly build the folding template.

Using the Update Template Button

The Update template button is an exciting feature that allows a user to modify an existing template Master Template (for example, change the size or folding style), or to turn an existing file that was not created in Template Master into a FOLDRite™ template—all without moving the artwork currently on the page!

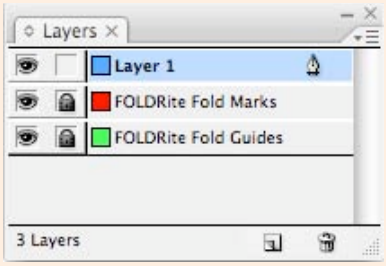
The button is grayed-out until an InDesign document is open. The document can be a FOLDRite™ Template generated by the plug-in, or an existing InDesign file that was not created using Template Master. The Update Template button will only be enabled if the front-most document in InDesign is capable of being turned into a template. Any document that is 2 or fewer pages in size can be updated. If the front-most open InDesign document has more than 2 pages, it cannot be updated. Simply open an InDesign file, launch Template Master if it is not already open by choosing File > FOLDRite™ Template Master, choose the new folding style, size, etc. and click "Update Template."

Working with Your Template Master Template

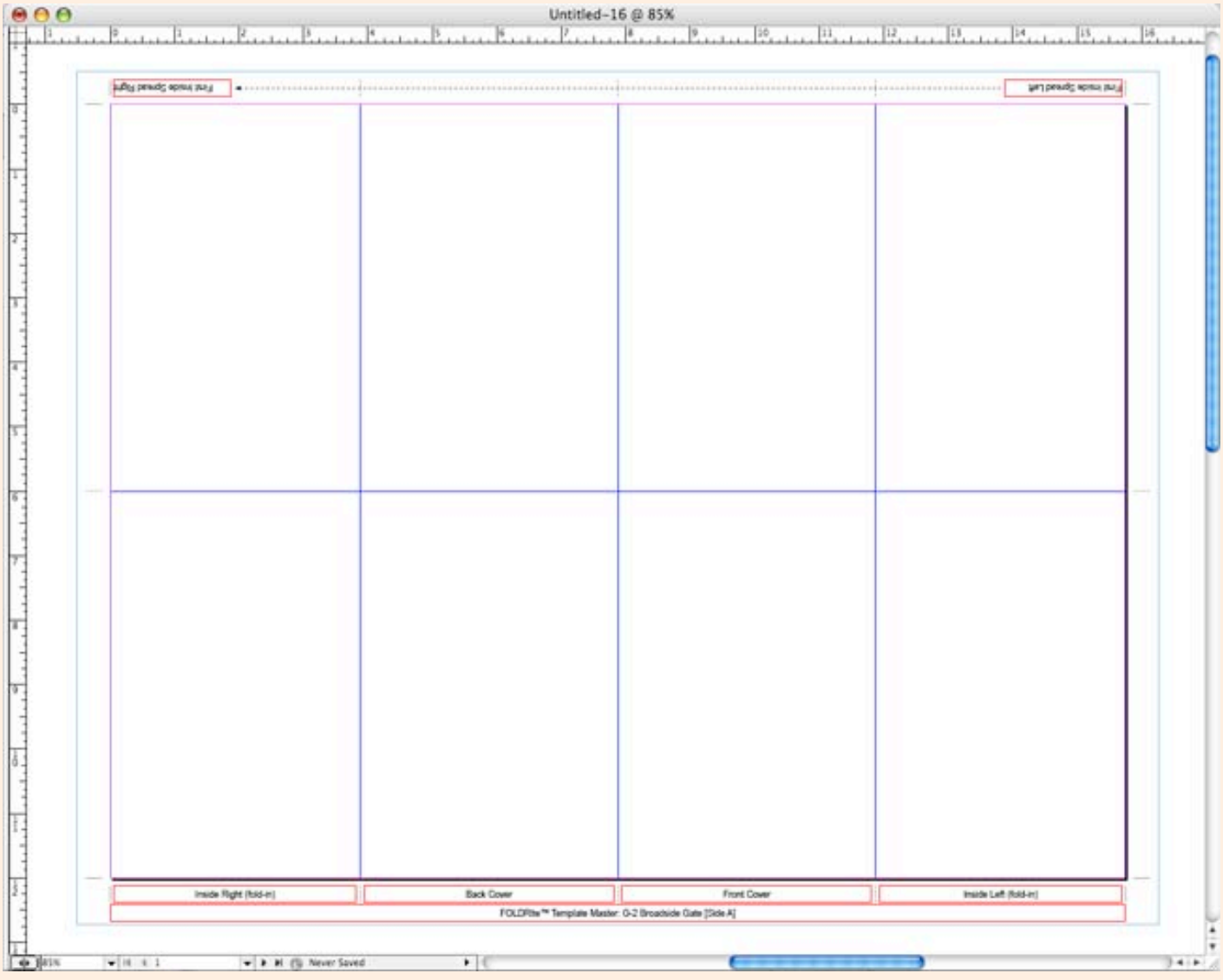
Once the Build Template button has been clicked, Template Master instantly builds your template in InDesign. The sample template below is a Broadside Gate, identified in the bottom slug area (see below). The template will be two pages—side A and side B of the folded piece. If you only intend to print on one side of the piece, simply delete the second page of the document.

If you look at the Layers palette, you'll notice that your template is initiated with three layers. These layers organize the fold marks and panel cues that are visible in the slug area, and the fold guides that sit on the page. Both of these layers may be viewed and hidden. The layers are locked to avoid accidental movement of these important markers. It is strongly suggested that the layers remain locked and unaltered at all times.

Looking at this sample "Side A", you will notice that at the top of the page in the slug area, the panel cues are upside down. When this appears, it means that your artwork must be rotated 180° in layout.

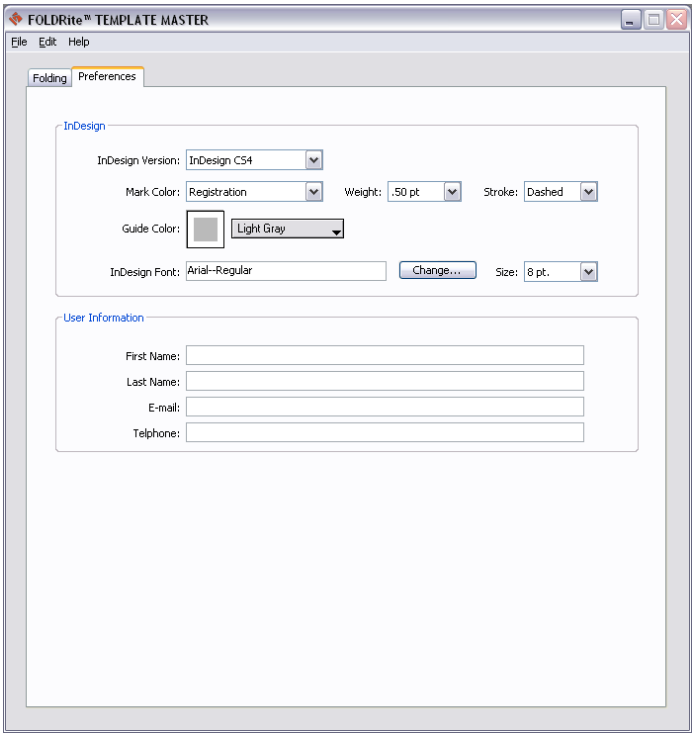


There are three layers in the Layers palette—an unlocked working layer, and two locked layers that contain the fold marks and panel cues, and the fold guides. Click the "eye" icon to reveal and hide, and click the "padlock" icon to unlock and lock. It is strongly suggested that the FOLDRite™ layers are not unaltered.



Setting Preferences:

You can change your Template Master preferences by clicking the “Preferences” tab in the Template Master window.



Printing Your Template:

Your FOLDRite™ template is print-ready. Each custom template that is generated using FOLDRite™ Template Master is compensated for the folding process and made to trim size. Simply start designing, with the understanding that your file is production-perfect.

A few tips for best results:

- Do not unlock and move the fold marks or fold guides that reside on the layers labeled “FOLDRite Fold Marks” and “FOLDRite Fold Guides.”
- Once you have made a template, it is always a good idea to print and black and white laser of the file with fold marks, trim it out and fold it down to be sure it is the size and style you wanted. Also this is a good way to visualize the fold as a 3-dimensional piece, since you will be designing it flat.
- To print the fold marks, choose File > Print, then click on the “Marks and Bleed” category in the left side menu, and in the “Bleed and Slug” section of that window, check the box that says “Include Slug Area.”

Support:

If you encounter any issues with Template Master, email us at foldrite@foldfactory.com and we will be happy to answer your questions.